

**SUMMARY OF THE  
ON-SITE ASSESSMENT COMMITTEE MEETING  
MAY 10, 2000**

The On-site Assessment Committee of the National Environmental Laboratory Accreditation Conference (NELAC) met by teleconference on Wednesday, May 10, 2000, at 1 p.m. Eastern Daylight Time (EDT). The meeting was led by its chair, Mr. William Ingersoll of the United States Navy. A list of action items resulting from this meeting is given in Attachment A. A list of participants is given in Attachment B. *The purpose of the meeting was to develop a proposed agenda for the upcoming Sixth NELAC Annual Meeting (NELAC VI).*

**INTRODUCTION**

Mr. Ingersoll noted that he will need a headcount of the committee members who will be attending NELAC VI and indicated that he would send an E-mail to committee members in regard to this. Mr. Ingersoll also suggested that discussion at NELAC VI would include:

- C      Comments from the floor on proposed changes to the Standard
- C      Discussion of basic assessor training and feedback on the pilot NELAC Assessor Training Course
- C      Presentation of the committee's position paper on the level of detail required in technical training
- C      Proposal of how the committee intends to handle the technical training courses
- C      Discussion of technical assessment checklists

**BASIC ASSESSOR TRAINING**

The committee engaged in moderate discussion of the pilot training course offered in March and April of 2000. Ms Marlene Moore indicated that she has prepared a general summary for the NELAC Board of Directors outlining how many students attended the course, how many of the students took the final exam, how many certificates were given, etc. She has not yet completed her review of the exam scores, but anticipates that she will have prepared such a summary by NELAC VI. It was noted that the basic assessor training course needs some revision before it is offered again and that Dr. Ken Jackson, of the New York State Department of Health, had expressed his willingness during the pilot course to revise the course materials. It was suggested that the committee establish a subcommittee, to be chaired by Dr. Jackson, charged with revising the pilot course. Such a subcommittee would provide one central point to which comments on the pilot course could be funneled. Mr. Ingersoll volunteered to contact Dr. Jackson within the next week to initiate such a subcommittee.

It was suggested that the basic training course be included in the NELAC Standard as an appendix. In discussion of this suggestion, the committee noted that inclusion of the course as an appendix to the

approved Standard would ensure consistency as it is presented by different entities and circumvent the issue of identifying a separate body to approve the course. Standardized training materials (overheads, handouts, etc.) would then be published on the NELAC Website so that each Accrediting Authority could use them to present their training course. It was also suggested that the course be referred to as a “Basic Training Standard,” and that this overall training Standard should be based on the International Laboratory Accreditation Cooperation (ILAC) 1994 G3 guidance document, *Guidelines for Training Courses for Assessors*.

It was suggested that some text constituting a short reference to the Basic Training Standard Appendix and the title page of the proposed appendix be included in the changes to the Standard to be proposed at NELAC VI. In the ensuing discussion it was noted that the only way to accomplish this would be for Mr. Ingersoll to propose the change from the floor, and that the committee does not want to run into difficulties by proposing too many changes after the published changes have already been submitted to EPA. It was decided that Mr. Jack Hall will prepare some draft text and Mr. Ingersoll will contact Ms. Jeanne Hankins, NELAC Director, to get her input on proposing such a change from the floor.

## **TECHNICAL TRAINING**

It was noted that Mr. Richard Sheibley is preparing language regarding the committee’s approach to technical training. Ms. Rosanna Buhl is word-smithing the position paper on technical training prepared by Mr. Wayne Davis. She will distribute this paper for committee feedback.

There was some discussion of whether the committee will develop a general objective for all the technical courses or a different objective for each technical discipline. It was suggested that the committee take a tiered approach in which specific subsets for separate technical disciplines are grouped under a general set of course objectives for all disciplines. Given the time-frame confronting them, the committee decided to develop the general set of objectives first and then develop discipline-specific objectives. It was also suggested that the committee follow the Quality Systems (QS) assessor checklist’s first level of detail to create a general outline. In discussion of the QS checklist developed by Mr. Charles Dyer, Mr. Ingersoll informed the committee that he had been told by members of the NELAC QS committee that the checklist goes beyond what is included in the NELAC QS Standard and may have to be pared down.

The committee discussed the issue of including data package review in the technical training courses and how they might use current courses already offered by the environmental testing community. It was noted that if the committee set the standard for one type of training course including data package review, then it would act as the driver for other organizations to tailor their courses to meet the requirement, thereby ensuring consistency between the courses. The discussion led committee members to ask how much detail would be included in technical training courses and to note that data package is tied closely to discipline. The committee is no longer moving in the direction of developing hands-on courses that are method-specific. No consensus was reached on the issue of technical training.

## TECHNICAL ASSESSMENT CHECKLISTS

Discussion turned to whether the committee will pursue the development of technical assessment checklists and it was noted that the checklists previously developed by the committee include much detail and quite a few errors. Committee members expressed the opinion that the existing checklists would need considerable editing for use. In response to the question of whether the committee is still talking about walking through each method or applying Mr. Dyer's basic QS checklist to each method, it was noted that an assessor can take that general QS checklist and go to any method to see if it meets the requirements. A follow-up question concerned what level of detail an assessor must check in addition to the quality elements outlined in Mr. Dyer's QS checklist. It was noted that the committee could get bogged down in the detail of capturing critical technical elements for each method. Committee members discussed what they know of the few NELAP assessments that have been performed by assessors from the approved Accrediting Authorities. They believe that most Accrediting Authorities are using both the general QS checklist and technical checklists of their own making. It was suggested that the committee ask the Accrediting Authorities to submit their checklists to the On-site Assessment Committee so that the committee can combine the best elements of those checklists. Although it was also suggested that the committee review the Drinking Water Certification Manual's assessment checklist, it was noted that the checklist is limited for chemistry.

There was limited discussion of Performance-Based Measurement Systems (PBMS) as it applies to the assessment checklists. It was suggested that the inclusion of International Standardization Organization (ISO) Document 17025, *General Requirements for the Competence of Testing and Calibration Laboratories*, in the NELAC Standards will provide clarification in this area by providing guidance in how to validate a method, how to determine uncertainty, etc. No consensus was reached on the issue of technical checklists.

## MISCELLANEOUS BUSINESS/CONCLUSION

Ms. Mimi Uhlfelder brought to the committee's attention the May 8, 2000, memorandum from Dr. Jim Pearson, the NELAC Chair, announcing that the Board of Directors has extended the goal for announcing NELAC accredited laboratories from July 2000 to January 2001.

The allotted time for the teleconference having expired, Mr. Ingersoll reminded participants that the committee's next teleconference is scheduled for May 24, 2000. The meeting was adjourned at 2:30 p.m. EDT.

**ACTION ITEMS  
ON-SITE ASSESSMENT COMMITTEE MEETING  
MAY 10, 2000**

| <b>Item No.</b> | <b>Action</b>   | <b>Responsible Member</b> | <b>Date to be Completed</b> |
|-----------------|---|---------------------------|-----------------------------|
| 1.              | Committee to present summary of pilot NELAC Assessor Training Course.   | M. Moore                  | NELAC VI                    |
| 2.              | Committee to contact Dr. Ken Jackson to chair a subcommittee charged with revising training materials based on feedback on the pilot assessor training course. Committee will submit comments to Mr. Friedman.            | W. Ingersoll              | 5/17/00                     |
| 3.              | Committee to prepare draft language referencing Basic Training Standard to be included as an appendix to Chapter 3, and to contact Ms. Jeanne Hankins for input regarding proposing the language from the floor at NELAC. | J. Hall and W. Ingersoll  | 5/24/00                     |
| 4.              | Committee to prepare draft language outlining committee approach to technical training.   | R. Sheibley               | 5/24/00                     |
| 5.              | Committee to prepare position paper on the level of detail to be included in technical training.  | R. Sheibley               | 5/24/00                     |

**PARTICIPANTS  
ON-SITE ASSESSMENT COMMITTEE MEETING  
MAY 10, 2000**

| <b>Name</b>  | <b>Affiliation</b>                           | <b>Phone/Fax/E-mail</b>  |
|--|--|--|
| Ingersoll, William<br>Chair                              | US Navy                                      | T: 843-764-7337<br>F: 843-764-7360<br>E: IngersollWS@navsea.navy.mil       |
| Buhl, Rosanna  | Battelle Ocean Sciences                      | T: 781-952-5309<br>F: 781-934-2124<br>E: buhl@battelle.org                 |
| Davis, R. Wayne<br>(absent)                              | SC Dept. of Health and Env Cntl              | T: 803-935-7025<br>F: 803-935-6859<br>E: davisrw@columb36.dhec.state.sc.us |
| Davis, Susan<br>(absent)                                 | City of Austin                               | T: 512-927-4004<br>F: 512-927-4038<br>E: Susan.Davis@ci.austin.tx.us       |
| Dyer, Charles  | NH Dept of Environmental<br>Services         | T: 603-271-2991<br>F: 603-271-2867<br>E: c_dyer@des.state.nh.us            |
| Friedman, David<br>(absent)                              | USEPA  | T: 202-564-6662<br>F: 202-565-2432<br>E: friedman.david@epa.gov            |
| Hall, Jack   | Interpretive Consulting                      | T: 865-576-4138<br>F:<br>E: scl3883@aol.com                                |
| Moore, Marlene   | Advanced Systems, Inc.                       | T: 302-834-9796<br>F: 302-995-1086<br>E: mmoore@advancedsys.com            |
| Sheibley, Richard<br>(absent)                            | PA Dept of Env Protection                    | T: 717-787-4669<br>F: 717-783-1502<br>E: sheibley.richard@dep.state.pa.us  |
| Uhlfelder, Mimi<br>(Temp. replacement<br>for A. Steinke) | Severn Trent Laboratories (STL<br>Baltimore) | T: 410-771-4920<br>F: 410-771-4407<br>E: muhlfelder@stl-inc.com            |
| Finazzo, Barbara<br>Ombudsman<br>(absent)                | USEPA Region 2                               | T: 732-321-6754<br>F: 732-321-4381<br>E: finazzo.barbara@epamail.epa.gov   |
| Hunt, Margot<br>(Invited Guest)                          | USEPA/ORD/QAD                                | T: 202-564-6457<br>F: 202-565-2441<br>E: hunt.margo@epamail.epa.gov        |
| Greene, Lisa<br>(Contractor Support)                     | Research Triangle Institute                  | T: 919-541-7483<br>F: 919-541-7386<br>E: lcg@rti.org                       |